
Jehn-Yih Wong
Ming Chuan University

Wen-Hwa Lee
Ming Chuan University

Conceptual Framework for the characteristics of tour leaders

As tour leaders are the first-line attendants facing the tourists, they play an important role in the travel agency, especially in Asia. The group package tour has become one of the main modes in outbound travel. Based on previous studies about tour leaders' origin, role and personality, this article attempts to identify the unique characteristics of tour leaders compared to employees of other service industries. The article extracts the characteristics of a tour leader from existing literature with the goal of developing a conceptual framework. Finally the managerial implications for both tour leaders and travel agencies are discussed.

Key words: group package tour, tour leader, role, personality

Jehn-Yih Wong
Professor, Department of Business Administration
Ming Chuan University
250 Zhong Shan North Road,
Sec 5, Taipei 111, Taiwan, R.O.C.
Phone: 886-2-28809743
Email: jywong@mcu.edu.tw

Wen-Hwa Lee
Ph. D. Candidate, Department of Business Administration
Ming Chuan University
250 Zhong Shan North Road
Sec 5, Taipei 111, Taiwan, R.O.C.
Phone: 886-2-28806006
Email: joylee0220@gmail.com

Jehn-Yih Wong is a Professor in the Department of Business Administration, Ming Chuan University, Taipei, Taiwan. His research interests are in decision making analysis, data mining and consumer behavior, and he has published articles in *Tourism Management*, *Annals of Tourism Research*, *Journal of Air Transport Management*, *The Service Industries Journal* and *Transportation Journal*.

Wen-Hwa Lee is a Ph. D. Candidate in the Department of Business Administration, Ming Chuan University, Taipei, Taiwan. Her research interests include tour operations, human resource management, marketing and performance management.

Introduction

In many Asian countries, such as Taiwan, China and Japan, etc, especially for international trips, group or all-inclusive travel is very popular. The group package tour is one of the main modes of outbound travel (Wang & Sheldon, 1995; Prideaux, 1998). According to the annual report on Taiwan outbound travelers, from 1980 to 2009, the number of people going abroad increased from 484,901 to 8,142,916 and more than 35.6% of sightseers participated in some form of group tour (Tourism Bureau, 2010). Obviously, it is increasing rapidly.

For the group package tour (GPT), the travel agency assigns a tour leader to lead the tour, therefore making these individuals key front-line attendants in the tourism industry. According to the definition by the International Association of Tour Managers and the European Federation of Tourist Guide Associations (EFTGA) tour guides are persons who “guide groups or individual visitors from abroad or from the home country around the monuments, sites and museums of a city or region; to interpret in inspiring and entertaining manners in the language of the visitor’s choice, the cultural and natural heritage and environment (EFTGA, 1998). Some research on guided tours indicated that a tour leader assumes very important roles and responsibilities. Those are provision of security and protection, information, promotion of group interaction, surrogate parent, pathfinder, mentor, leader, mediator, and entertainer (Schuchat, 1983; Cohen, 1985). It is also clear that tour guides are the key actors in the process of folklorizing, ethnicizing, and exoticizing a destination (Salazar, 2005). That is, the work of a tour leader not only involves the transmission of information, but also presents it in an interesting and sincere manner. The argument about the role of tour leaders changes with time. In the early stage of touristic development, tour leaders emphasize their instrumental capability. But nowadays, they turn to focus on the communicative component. Besides passing on information about the destination and leading their guests in the right direction, they also can improve the

interaction between the members of the group, and give their guests happiness and a sense of security.

However, the tour leader's performance within the service encounter not only affects the company's image, but also customer loyalty and word-of-mouth communication. It further can be the factor that differentiates the tour company from its competitors. Hence, the personality, capability, and characteristic of tour leaders could be important factors that affect the satisfaction of tourists and the company's image. Tour leaders are also important to the tourist's perception of the whole tour, he or she is the predominant influence on GPT quality. The aim of this study follows from the previous studies about tour leaders' origin, role and personality. It also tries to figure out if there are any unique characteristics that could distinguish them from the employees of other service industries. Finally, the managerial implications for both tour leaders and travel agencies are discussed.

Origins

The historic origins of tour leaders can be traced back to the Grand Tour of 17th and 18th centuries and in the beginning of modern tourism which eventually superseded the Grand Tour in the 19th century (Brodsky-Porges, 1981). Tour guides are the key actors in the process of folklorizing, ethnicizing, and exoticizing a destination (Salazar, 2005). The argument about the role of tour leaders changes over the years. Cohen (1982) argued about the origins, structure and a dynamics of the role of tourist guides in his study. In his point of view, the two lines of the origin of modern tourist guide are pathfinder and mentor. The pathfinder is the one who leads or shows the way, especially leads a traveler in a strange country and provides privileged access to an otherwise non-public territory. The other, mentor, is hired to conduct a tour for the traveler or tourist and to point out objects of interest and edify his party as in social mediation and culture brokerage. In addition, the dynamics of

development of the role from Original guide to the Professional one is represented as a transition of emphasis from the instrumental to the communicative component.

Cohen also described the role of the modern guide by using two principal concepts, called the leader and the mediator. The “leader” is derived from the original conceptualization of the guide who focused almost entirely on instrumental leadership. His or her work is to ensure that the tourists reached their destination and returned safely. The “mediator” is a professional guide who provides mediation and interpretation. He or she takes greater care of the group and is inner-directed in contrast to the pathfinder. That is, nowadays, the work of a tour leader not only involves the transmission of information, but also its presentation in an interesting and sincere manner. The tour leader is no longer a pathfinder, he or she educates and guides, helping tourists find the meanings in what they see. By more professionalized training, tour leaders not only can know more about the geography and history of areas where they are guiding, but also in sociological and psychological arenas like culture and ethnic background. Besides passing on information about the destination and leading their guests to the right direction, they also can improve the interaction between the members of the group, and give their guests happiness and a sense of security.

Methodology

This study reviewed factors mentioned in previous studies identified through searches on ProQuest ABI and SDOS (ScienceDirect Onsite) databases about the tour leader’s role and personality published from 2000 to 2009. We first conducted a keyword search (terms included tour leader/guide, role and personality) to identify relevant published articles. In total, 12,057 studies drawn from academic research journals were included (mostly from America, Asia, the Middle East, Europe, and Australia). Then we searched the most relevant studies manually. We reviewed the resulting 31 articles, paying particular attention to the characteristics of tour leaders. The category classification concept developed and

recommended by Weber (1990) was employed here. Weber (1990) indicated that qualitative content analysis surpasses merely counting words to examining language intensely for classifying large amounts of text into an efficient number of categories that represent similar meanings.

After reading all the papers, an iterative process was conducted by judges A and B. Each of the units was read out in all the articles, classified, re-read, and re-classified. Then, for the intrajudge reliability testing, this study introduced a time lag of 2 weeks (Davis & Cosenza, 1993). The result of intrajudge reliability was above 0.80, and no new categories emerged. This result suggests that the process has content validity. We attempted to determine the unique characteristics of tour leaders by their explicit behaviors; therefore, we classified the characteristics by the aspect of their behavioral skills.

Findings

After developing the categories, we proposed a conceptual framework, as shown in Fig. 1. The framework represents the nine characteristics of tour leaders.

1. Control

During the traveling route, everything should be well organized, on time and authentic (Wong, 2001; Reisinger & Steiner, 2006). Tour leader bears the responsibility of participants' safety, comfort and efficiency. Black and King (2002) summarized the Tour-Guide competencies delivered during the training programme. They indicated that the tour guide should have the competency of "tour plans" which include overall quality of tour plans developed, operate these tours as described accurately and cover all the topics. Even where the territory is well marked and routes are routine, the guide has at least to make sure that everything is properly followed. The leader not only should follow a reasonably safe and secure route, but also exercise control over his party, prevent members from breaking away, collect stragglers, and generally, monitor the pace of movement of the party (Cohen, 1985).

This is sometimes referred to as the "shepherding and marshalling" (Buck, 1978; Holloway, 1981) function of the guide. In optional tours, tour leader should make clear in advance the danger of it and call the tourists' attention to the necessary safety precautions (Wang, Hsieh & Huan, 2000). For example, the tour leader should remind the tourists to put on the life-jackets for their safety to prevent them from danger during snorkeling. Punctuality is another feature that tour leaders should possess. Customers show dissatisfaction with delays caused by the tour guide's lateness, as for instance, "when everyone has arrived, the tour guide is nowhere to be found" (Wang, Hsieh & Huan, 2000). The guide also provides access to regions, and thereby also shoulders the responsibility for his party's behavior- e.g., that the visitors will not interfere with ongoing activities or cause damage (Cohen, 1985).

2. Sense of direction

Cohen (1985) indicated that although the general route and ultimate destination of the tour are usually set in advance, the tour leaders have the responsibility for the spatiotemporal direction of the trip. Sometimes they still need to find and to choose the way, which under unsettled conditions may necessitate considerable orientational skills (Cohen, 1982) and "navigational expertise" (Holloway, 1981). Cohen (1985) also argued that if the route is essentially open to choice, like in safari, fishing, and shopping trips, the tour leader has to possess considerable knowledge of available alternative locations and access routes and of the likelihood that his party will indeed encounter the desired "objects of interest" at a given location. In those situations, a sense of direction is really important while the tour is proceeding.

3. Tension management

Cohen, Ifergan and Cohen (2002) indicated that most respondents thought that to be a good the “Madrich” (informal counselor-guides that accompany adolescents from other countries on trips to Israel) should know how to solve problems. An excellent tour leader should take good care of complaints to moderate the conflict in the group and can help if problems occur. Tension Management also needs good communication skills including proficiency in languages. Some authors (Cohen, 1985) also argued that the guide is expected to take steps to prevent the emergence of tensions between members of his party (Schmidt, 1979) and intervene to smooth out relations once a conflict breaks out.

4. Animation

The guide is supposed to keep his party in good humor and in high morale through pleasant demeanor and occasionally jocular behavior (Cohen, 1985) to promote morale in the group. Cohen, Ifergan and Cohen (2002) indicated that an excellent “Madrich” should know how to create group climate. Over 68 percent of respondents agreed with that. Some researchers argued about “What is Professionalism?” They thought that the professionalism involves the sense of making tourists happy (Ap & Wong, 2001) and offering effective client control (Black & King, 2002). Animation refers to a new role of the guide as “animator” under the more stationery conditions of vacationing tourism. In some circumstances, the guide may try to "animate" members of his party, ie., to induce them to undertake various activities offered by the touristic facilities encountered on the itinerary (Cohen, 1985).

5. Professional knowledge

One of tour leaders’ specialties is providing necessary, updated and accurate information. Pond (1993) indicated that: “History has shown that training, evaluation and regulation of

guide's yields great rewards not only for travelers and guides but also for sites, cities and whole societies as well" (p.12). They should play the role of a "concierge" and should be quite knowledgeable about the cultural and entertainment attraction of the city and offer the highest level of service possible (Ap & Wong, 2001). Thus, the importance of the training, evaluation and regulation of guides, including their level of professionalism, cannot be ignored. Another important professional knowledge is medical care. Customers usually wish the tour leaders to have the knowledge of basic medical care. Wang et al. (2000) also indicated some examples of customers attaching importance to the tour guides' knowledge of medical care. When a tour member feels uncomfortable or gets hurt, the tour leader can provide medical care for him or her. With sufficient professional knowledge, tour leaders can arrange excursion information about the destination and recommend sights to the participants. They can also be an educator to help the guest understand the places they visit (Pond, 1993). For newcomers to the profession the training involves an "apprenticeship" system whereby the newcomer obtains experience by working with and observing an experienced tour guide (Ap & Wong, 2001).

6. Excellent presentation

Pond (1993) indicated that the guide is an ambassador who extends hospitality and presents the destination in a way that makes visitors want to return and is a host who can create a comfortable environment for the guest. Allen and Young (1997) summarized the results of efforts made by business schools to develop global cross-cultural awareness in students. In their study, most students believed that a crash course in "survival Spanish" would have increased their comfort level and effectiveness on the trip. Language is probably the most important channel of expression, discourses may take a variety of forms- oral, written, pictorial, symbolic, or graphic- and include linguistic and non- linguistic ways of producing

meaning (Kress & Van Leeuwen, 2001). It is necessary to provide basic language training in future courses for proper presentation. Moreover, study and briefing activities, including discussion on cross-cultural communication and culture shock, can help them face the future cross- cultural encounters. Through such training, tour leaders can play a good role as an interpreter. Through language training, they can obtain a friendly, well presented, appropriate speaking style and can tell the stories of the destination well. Through excellent presentation, the tour guide can help tourists form a positive impression of the destination and develop intentions to return.

7. Salesmanship

It is an unhealthy industry practice when tour itineraries are dictated by the financial objectives of the tour operator and the tour leader's income becomes heavily reliant on commissions. Tour leaders usually get their commission by recommending shopping to their group members. They also have to provide the knowledge of good products. Very few complaints are lodged against tour guides. If complaints are received, they tend to relate to poor language skills, "cheating" and too much shopping in the itinerary (Ap & Wong, 2001). They also mentioned that the unethical practices of some guides who force tourists to shop by closing the shop doors and preventing the tourists from leaving unless they have purchased something, or leading them to shops which offer overpriced, poor quality or fake goods. The guides are in an unenviable and awkward position because they are often forced to take tourists shopping and strictly follow the itinerary set by the employer and that is usually taken into account to evaluate the tour leader's performance. But through appropriate salesmanship, tour leaders not only can gain the commission, but also reduce those complaints from tourists. Practices like "cheating" or "forcing to shop" can lead to irreparably damage to the

destination's tourism image. Tour leaders should make the customers feel easy and comfortable while shopping.

8. Responsiveness

Providing quality services and meeting guests' expectations are also tour leaders' specialties. They should have the right attitude with respect to service, willingness to help, respect and empathy (Ap & Wong, 2001). As suggested by Wang, Hsieh and Huan (2000), the tour participants held tour guides responsible for checking the food and meals to be served overseas and inquiring about any particular dietary habits of the customer in advance. If a customer is a vegetarian, the tour leader should check all the meals during the briefing. Or when customers take kids or elderly people with them, who might not be used to foreign meals, tour leaders should brief these customers up front. Cohen, Ifergan and Cohen (2002) also indicated that an excellent "Madrich" should take care of the group, respect religious preferences and take care of each participant.

9. Sense of responsibility

Cohen, Ifergan and Cohen (2002) indicated that there are some characteristics that an excellent "Madrich" should have. One of the characteristics is "has a sense of responsibility". Pond (1993) also indicated that the role of the guide includes a leader capable of assuming responsibility. The characteristics are summarized in Figure 1.

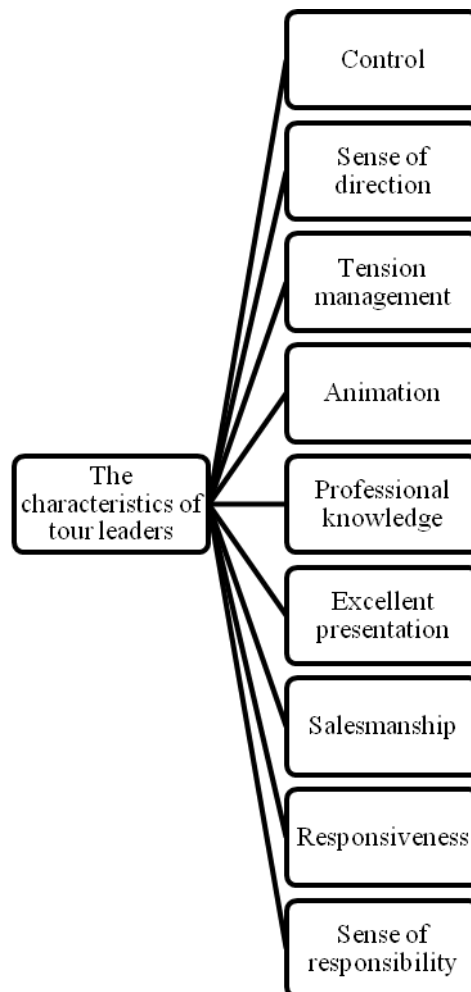


Figure 1. Conceptual framework of the characteristics of tour leaders.

Conclusion and Managerial Implications

As we discussed above, the tour leader is important to the tourist's perception of the whole tour and the destination. Tour companies usually seek to employ people whose personalities or emotions can be appropriate for the characteristics of tour leaders. The study indicates the nine characteristics of tour leaders; those are control, sense of direction, tension management, animation, professional knowledge, well presentation, salesmanship, responsiveness and sense of responsibility. Several researchers have indicated that the guide plays various important roles and has many responsibilities. Ultimately, they are responsible for tourist satisfaction.

The service encounter during the tour depends on the tour leader's personality and of its match with the characteristics of this job. The characteristics of tour leader are different from the employee of other service industries. Tour leaders might be humorous, conscientious and agreeable. But they might be neurotic as well. When they suffer danger or conflict during the trip, they have to be stay calm but still have to display positive emotion when facing their guests. An enhanced understanding of what is occurring during the service encounter between the tourist and tour leader is necessary for the managers of travel agencies. It is not only useful in marketing, but also for managing, recruiting and training tour leaders. The managers should understand how the service encounter influences the tourist's satisfaction, and how it can be important as a competitive tool (Mossberg, 1995). Training of tour guides is clearly a crucial way to ensure positive service encounters.

It is not easy to be an excellent tour leader because he or she could face many complicated, even dangerous situations. Through appropriate training, tour leaders can know more about those characteristics of this job and prepare themselves to be an "excellent" guide. It may enhance the financial well-being for the tour leader and increase the earning of the travel agency. It can also make the tourists purchase again and stimulate new business through word-of-mouth for the company. The limitation of this study was that its coverage was narrowly defined and that we classified only the characteristics by the aspect of their behavioral skills. Further research can attempt categorization using other aspects such as the cognitive or affective skills of tour leaders, or the differences of tour experience contribution between volunteer/salaried tour leaders, male/female tour leaders, and age or years of experience as a tour leader. In addition, the development of technological devices to replace tour guides and their proposed influence on the tourism experience should be discussed.

Acknowledgements

This work was supported by the National Science Council of Taiwan, R.O.C. under contract No. NSC99-2410-H-130-041-MY2.

References

- Allen, D. & Young, M. (1997). From Tour Guide to Teacher: Deeping Cross-cultural Competence Through International Experience-Based Education. *Journal of Management Education* 21(2): 168-189.
- Animation (1975). *Animation im Urlaub*. Starnberg: Studlenkreis fur Tourismus.
- Ap J. & Wong K. K. F. (2001). Case Study on Tour Guiding: Professionalism, issues and problem. *Tourism Management* 22(5): 551-563.
- Black R. & King B. (2002). Human Resource Development in Remote Island Communities: an Evaluation of Tour-guide Training in Vanuatu. *International Journal of Tourism Research* 4: 103-117.
- Brodsky-Porges. E. (1981). The Grand Tour: Travel as an Educational Device: 1600- 1800, *Annals of Tourism Research* B(2): 171 - 186.
- Buck. R. C. (1978). Boundary Maintenance Revisited-Tourist Experience in an Old Order Amish Community. *Rural Sociology* 43(3):221-234.
- Cohen. E. (1982). Jungle Guides in Northern Thailand: The Dynamics of Marginal Occupational Role. *Sociological Review* 30(2):234-266.
- Cohen, E. (1985). The tourist guide: The origins, structure and dynamics of a role. *Annals of Tourism Research* 12(1): 5-29.
- Cohen, E. H., Ifergan, M. & Cohen E. (2002). A New Paradigm in Guiding The Madrich as a Role Model. *Annals of Tourism Research* 29(4): 919-932.
- Davis, D., & Cosenza, R. M. (1993). *Business research for decision making*. California: Thomson.
- EFTGA. (1998). *European federation of tour guides association information brochure*, Unpublished.
- Holloway. J. C. (1981). The Guided Tour: A Sociological Approach. *Annals of Tourism Research* 8(3): 377-402.
- Kress, G., & Leeuwen, T. V. (2001). *Multimodal Discourse: The Modes and Media of Contemporary Communication*. London: Arnold.

- Mossberg, L. L. (1995). Tour leaders and their importance in charter tours. *Tourism Management* 16(6): 437-445.
- Pond, K. (1993). *The professional guide: Dynamics of tour guiding*. New York: Van Nostrand Reinhold.
- Prideaux, B. R. (1998). Korean outbound tourism: Australia's response. *Journal of Travel and Tourism Marketing* 7(1): 93-102.
- Reisinger Y, & Steiner C. (2006). Reconceptualising Interpretation: The Role of Tour Guides in Authentic Tourism. *Current Issues in Tourism* 9(6): 481-498.**
- Salazar, N. (2005). Tourism and Globalization: “Local” Tour Guiding. *Annals of Tourism Research* 32: 628–646.
- Schmidt, C. J. (1979). The Guided Tour: Insulated Adventure. *Urban Life* 7(4): 441-467.
- Schuchat, M. G. (1983). Comforts of group tours. *Annals of Tourism Research* 10(4): 465-477.
- Tourism Bureau (2010). 2009 annual survey report on R. O. C. outbound travelers. Taipei: Tourism Bureau.
- Wang, Y., & Sheldon, P. J. (1995). The sleeping dragon awakes: The outbound Chinese travel market. *Journal of Travel and Tourism Marketing* 4(4): 41-54.
- Wang, K. C., Hsieh, A. T., & Huan, T. C. (2000). Critical service features in group package tour: An exploratory research, *Tourism Management* 21(2): 177-189.
- Weber, R. P. (1990). *Basic Content Analysis* (2nd ed). California: Sage publications.
- Wong A. (2001). Satisfaction with Local Tour Guides in Hong Kong, *Pacific Tourism Review* 5(1): 59-67.